Site Administrator Guide

This Site Administrator Guide gives CA Web Publishing Service (CAWeb) users assigned to the Site Administrator role the necessary information to perform administrative tasks using the Content Editor.

Information related to the Author and Editor roles and the use of the Page Editor is not included here but is covered in the CA Web Publishing Author & Editor Guide. The prerequisite to using this guide is familiarity with the terminology, concepts and tasks described in the CA Web Publishing Author & Editor Guide.

1   Preamble

1.1.1   Version History

Date	Version	Description	Author
12/18/2015	0.5	Draft	Ryan Vollmer
2/1/2016	0.9	Comprehensive Updates	Kevin Paddock
2/09/2016	1.0	Initial Release	Kevin Paddock

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Table of Contents

2   Overview – Content Editor Components

A Site Administrator (admin) has permission to access and modify site management settings including the site's color scheme, main menu navigation, user manager, footer links, agency tags and various other settings. Administrative tasks require the use of the ***Content Editor***. Only site admins have access to the Content Editor and the Page Editor. Authors & editors have access to the ***Page Editor*** only. The Content Editor is accessed from within the Page Editor. After a site administrator logs into CAWeb, the Page Editor is displayed – the same UI displayed for authors & editors. However, the site admin has access to additional menu and Ribbon features, including the Admin tab with access to the Content Editor button.
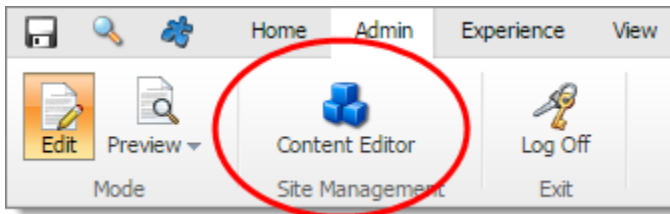

Figure 1. Page Editor when logged in as site admin. The Admin tab is selected.

When logged in as a site administrator, please keep this in mind: to edit page layouts, components and content, use the Page Editor (no need to open the Content Editor). To make changes to site-wide settings and to perform administrative tasks use the Content Editor. The rest of this guide, unless otherwise stated, explains the use of the Content Editor for site administration.

To begin making site administrator changes to your website, log in to your site then click the Admin tab on the Page Editor menu, then click the Content Editor button as shown above.

2.1   The Content Editor vs. The Page Editor

The Content Editor is an editing tool that *can be used* to manage and edit all website content (but not the layout of web pages). The Page Editor is an editing tool that can be used to edit all website content AND the layout of web pages. Therefore, the tool of choice for maintaining website content and page layout is the Page Editor. Though the Content Editor is a powerful tool for working with website content, this manual does not describe how to use the Content Editor for any tasks other than changing administrative and site-wide settings. The Content Editor provides access to features needed by site administrators. The Page Editor cannot be used to access site-wide settings or administrative features.

Let's get familiar with the Content Editor. The Content Editor UI is arranged somewhat like Windows Explorer or My Computer layouts in MS Windows desktop. Note the content tree on the left, the menu and Ribbon at the top and the data form (content properties form) on the right.
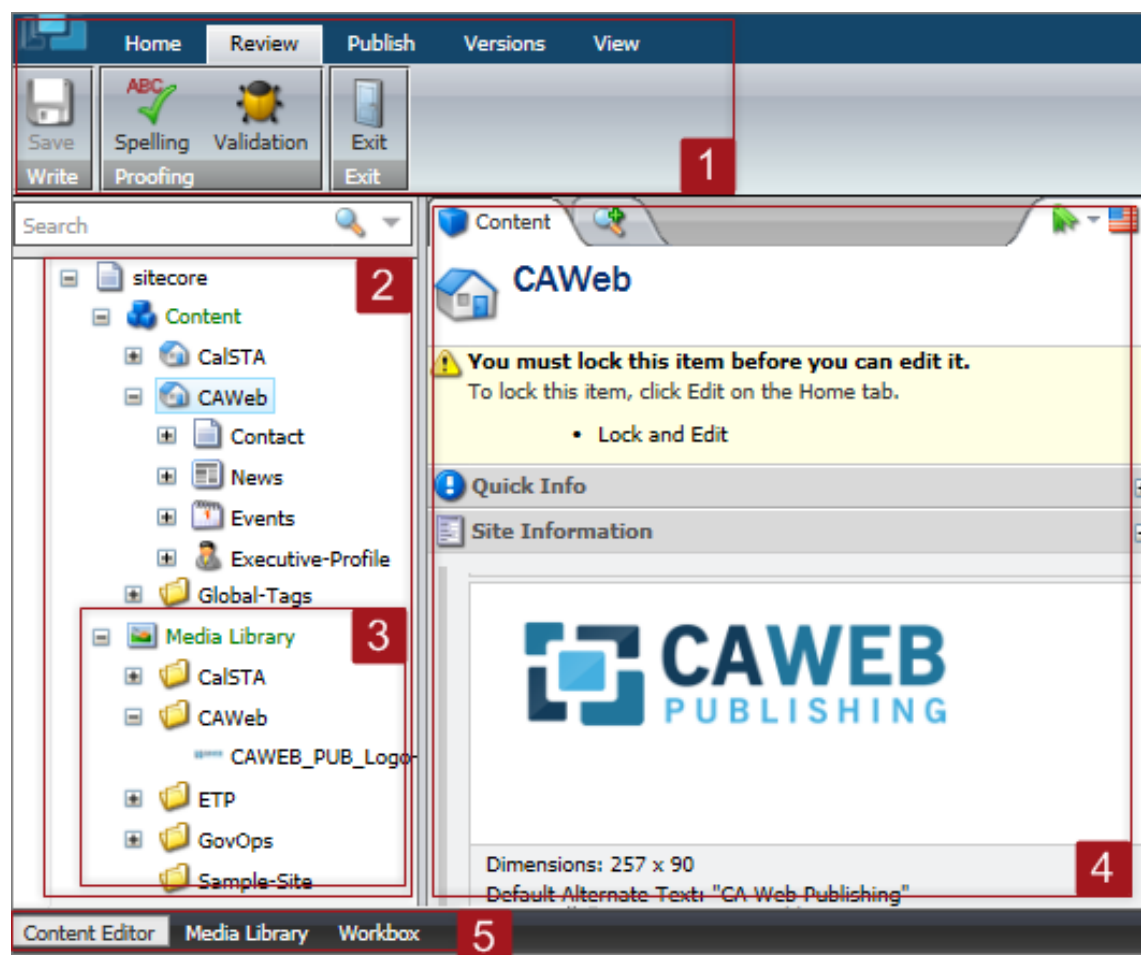
Figure 2. Content Editor Layout

1. **Ribbon**: User controls, such as locking an item and publishing.
2. **Content Tree**: Hierarchical list view of the site's resources.
3. **Media Library**: Storage location for images, documents, etc.
4. **Data Form**: Contains a selected item's data properties.
5. **Workspace Tabs**: Quick links to change the workspace

2.2   The Ribbon

The *Ribbon* contains a tab menu with the following menu items: *Home*, *Review, Publish*, *Versions, and View*. Greyed out icons indicate actions that are currently not available but will become available in another context. All tabs contain a *Write* (*Save*) and *Exit* (*Exit*) button (with the exception of the View tab). Only the tabs that contain administrative functions will be discussed here. For example, note the Home tab is selected to show the User
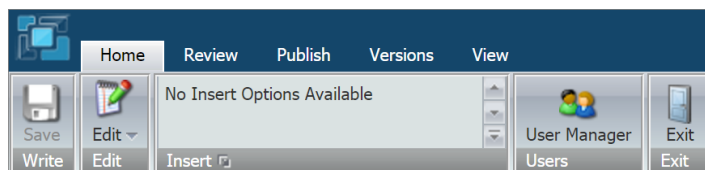

Figure 3. Home tab selected.

Manager button. The User Manager will be explained later in this manual.

Remember that site admins will only use the Content Editor to make site-wide and administrative changes. To update page types, change layouts and add/modify content, use the Page Editor.

2.3 The Content Tree

The **Content Tree** is a hierarchal representation of a site's content and resources. Whenever a content item or resource is added via the Page Editor, it becomes part of the Content Tree in the Content Editor. Content items and resources include pages, images, documents, etc.

The Content Tree also holds items of interest to site administrators: main menu navigation links, footer links, and agency tags. These are all stored under the root or top-level site node.

Important: Only content items are stored in the tree. Page layout components are not. To view content items in their context on a website page, use the Page Editor.

The Content Tree is visible only if the "Content Tree" checkbox in the **View** tab of the **Ribbon** is checked.

Clicking the "+" sign next to an item expands the view to reveal that item's sub-items.

Figure 4. The Content Tree and Media Library enabled.

The Content Editor provides access to content-related functions and tasks, including inserting new pages, searching for content items, deleting, etc. The list of available functions is displayed by right clicking on any item (or node) in the tree. An example is shown to the right. This menu allows for tasks such as inserting new items as sub-items, deleting, and renaming. Depending upon the type of item selected, the **Insert** menu's options will vary. For our purposes, only the top-level node (under the blue, 3-box icon named "Content") is important. The root or top-level node for your web site contains the site-wide settings which site admins have permission to modify.
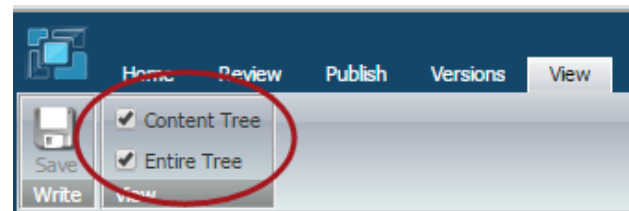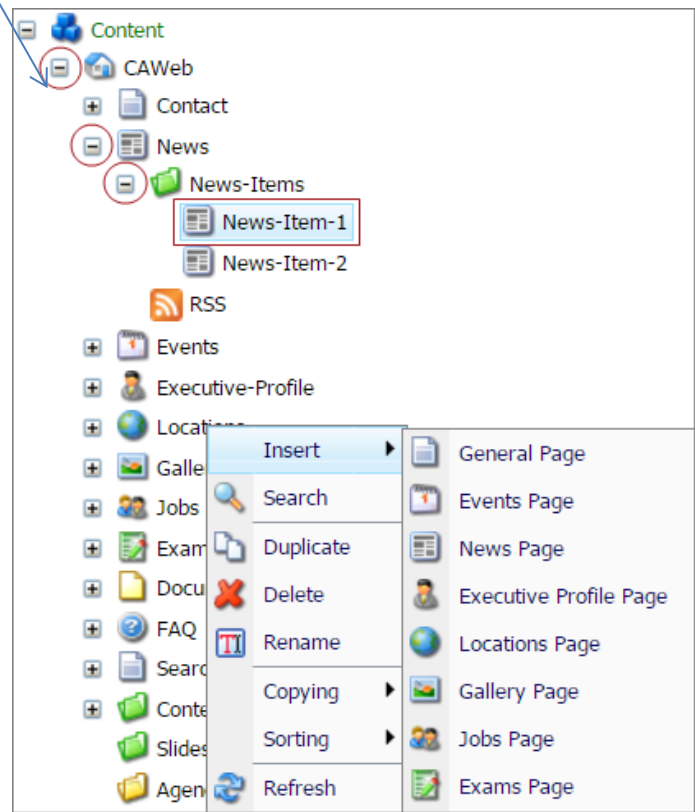

Figure 5. The Content Tree with an item selected.

2.4 The Media Library

The *Media Library* contains all media and document resources such as PDF's and images.
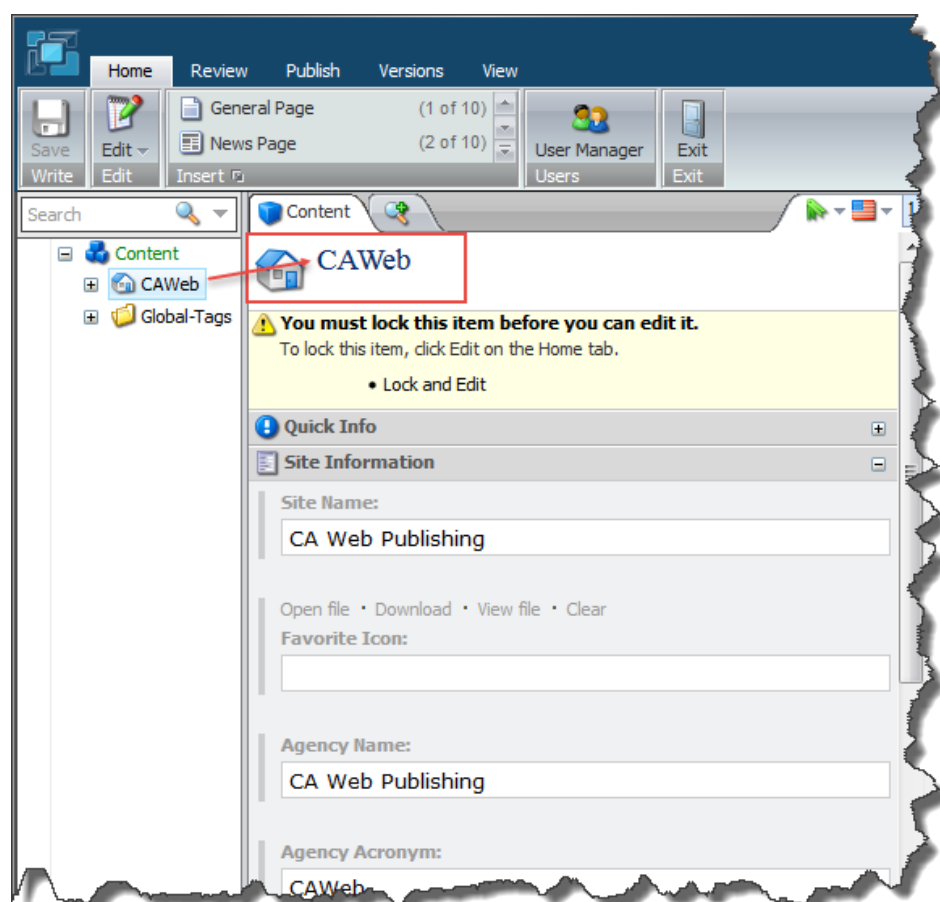
The Media Library is part of the Content Tree. Both the *Content Tree* and *Entire* **Tree** checkboxes must be checked to view the Media Library. See figure 4 above.
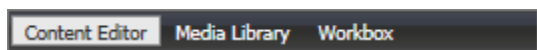
2.5 The Data Form

The Data Form displays the item properties of the item (or node) selected in the Content Tree.

When a Content item is selected in the Content Tree, a *Content* tab appears containing the data properties associated with the item. The item or node name appears in the top left of the data form. Again, site admins are only concerned with the properties of the top-level data form.

2.6 Workspace Tabs

The tabs at the bottom left of the Content Editor allow users to navigate between the *Content Editor*, *Media Library*, and *Workbox*. The *Media Library* tab shows only the Media Library. The *Workbox* tab is used for the two step workflow process, as described in the CAWeb Author & Editor Guide.

This concludes the overview of the Content Editor.

3   Site Configuration

Site Admins can make changes to a number site-wide and homepage settings. The homepage position of the items that can be changed is shown in the image below. The data form of the site root node holds the field values for these item, including: agency logo, main menu navigation links, navigation style, search box location, banner image, color scheme, footer links and agency tags. Note: the screen shot below is the Page Editor view of the Homepage.

Figure 6. Page Editor view of fields admins can edit.

1. **Agency Logo:** Image that is centered and on top of the banner image (if present).
2. **Main Menu Navigation:** Sites main navigation links.
3. **Search Box Location:** Location of search box. ("Middle" is chosen for the example).
4. **Custom Background Banner Image**: Image that is behind the main menu navigation, search box, and agency logo.
5. **Footer Links**: the links that appear in the footer area of website pages.

3.1   Site Settings

Site settings are changed using the home page Data Form. Most settings are applied site wide and include fields for all the properties

Step 1: Select your site's top-level node (home page) on the **Content Tree.** The site's name will display at the top left of the **Data Form.**

Step 2: Click **Edit** in the **Home** tab of the **Ribbon**. The **Lock and Edit** link at the top of the Data Form does the same thing. Fields cannot be modified until the data form is locked.
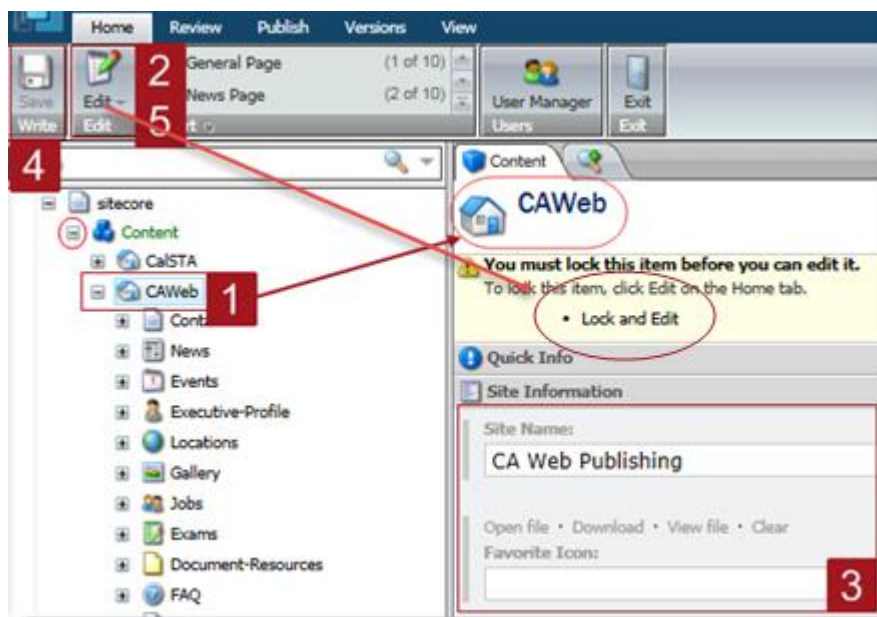
Step 3: With the data form locked, all the fields under the Site Information heading can be modified. The complete list of fields available is as follows: Site Name, Favorite Icon, Agency Name, Agency Acronym, Agency Logo, Color Scheme, Desktop Navigation Style, Mobile Navigation Style, Search Box Location, Google Analytics ID, Google Search ID, Use Google Translate, Google Webmaster Tools Meta Tag, Use SocialSharer, Contact Us Link, Background Banner Image.

Step 4: After making the desired modifications, click **Save** in the **Ribbon** to apply any changes.

Step 5: Click the **Edit** button again to lock the data form items.

Next, let's examine some of the data form items in more detail.

3.1.1 Static Banners

Notice the item named Custom Background Banner Image. It's the last field in the form, so scroll down if you don't see it. This field allows admins at replace the default banner graphic with a custom image.
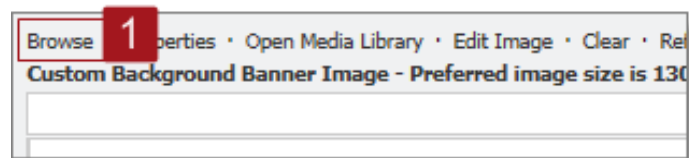
Step 1: Click **Browse** above the **Custom Background Banner Image** field in the site's home page Data Form.
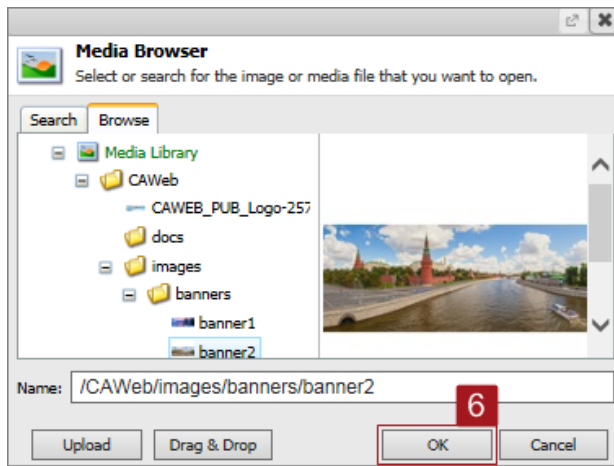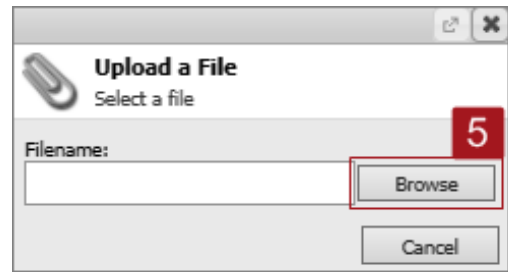
Step 2: Click the **Browse** tab.

Step 3: Select a destination folder. We must first upload an image into
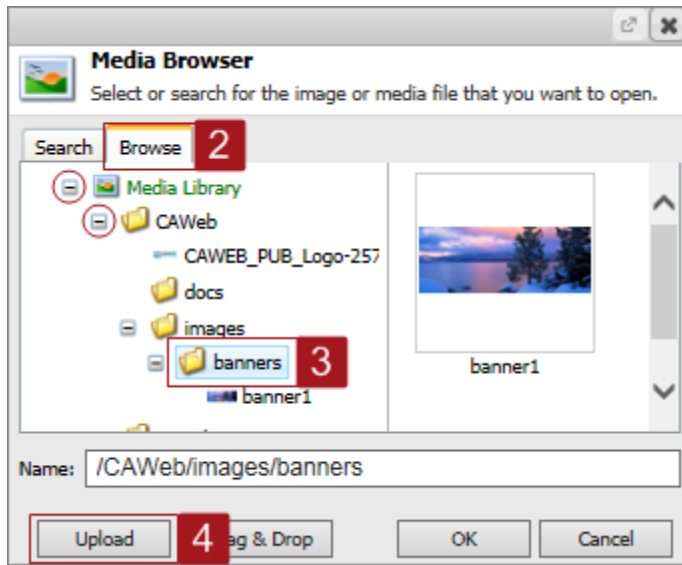
CAWeb, and then apply it to the site.

Step 4: Click *Upload*.

Step 5: Click *Browse* and select the image to upload*.*

Step 6: Click *OK.*

To add attributes such as alternative text, open the image in the Media Library.

Click *Save* then *Edit* in the *Home* tab when finished. Switch to the *Page Editor* interface to view changes. The uploaded image will now be the site's banner image.
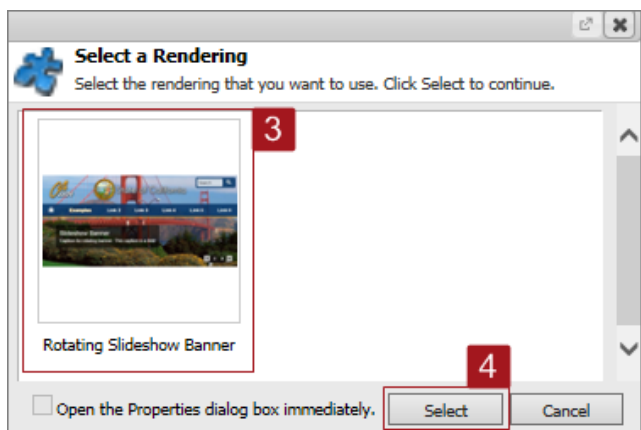

3.1.2 Rotating Banners

Modifications to the site home page can be made by site admins only. Some of these home page settings, like the banner image, can only be changed using the Page Editor. To change the

banner image, switch to the *Page Editor*, navigate to the site's home page, and then *Lock* the page.

Step 1: Click in the *bannerPlaceholder* area of the homepage which is directly below the *main menu navigation.*

Step 2: Click *Add to here*.

Step 3: In the "Selection a Rendering" list, you should see only one "rendering", the Rotating Slideshow Banner. Select *Rotating Slideshow Banner.*
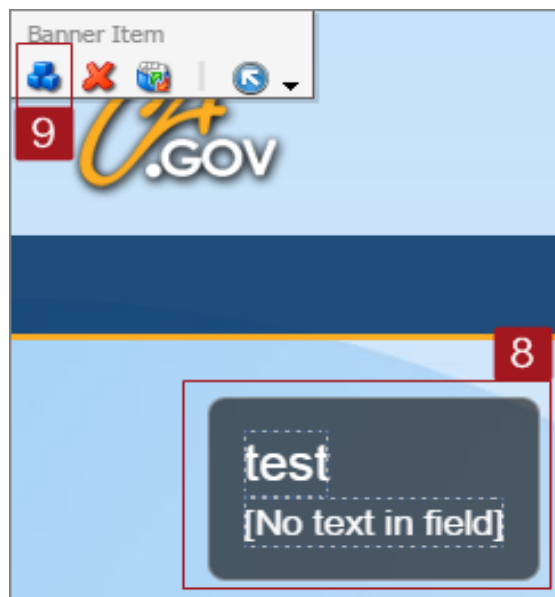
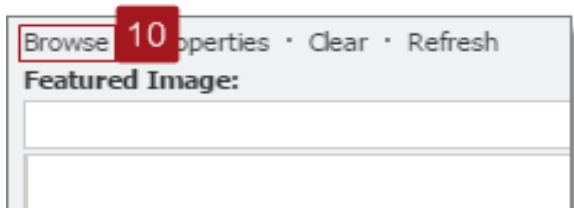**Step 4:** Click the *Select* button.
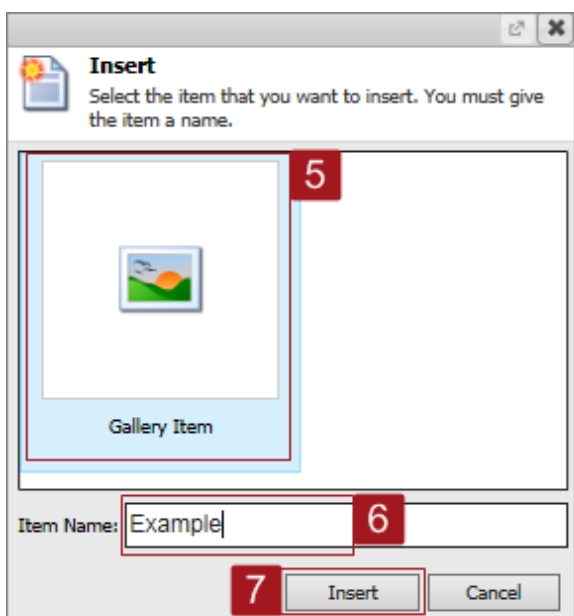
Step 5: Select *Gallery Item*.
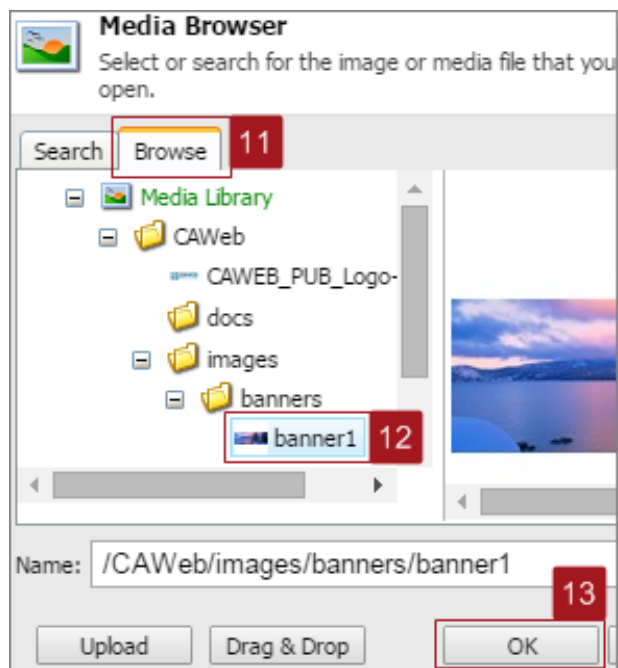
Step 6: Type in an *Item Name.*

Step 7: Click *Insert*.

Step 8: Click the *Caption* box located on the left side of the banner. The *Title* ("test")and *Teaser* ("No text in field") fields are displayed in the *Caption* box.

Step 9: Click the three blue boxes on the items floating toolbar.

Step 10: Click *Browse* above the *Feature Image* field.

Step 11: Select the *Browse* tab.

Step 12: Select an image to use as the banner.

Step 13: Click *OK*.

Step 14: Click *OK* again to set the banner to the selected image.
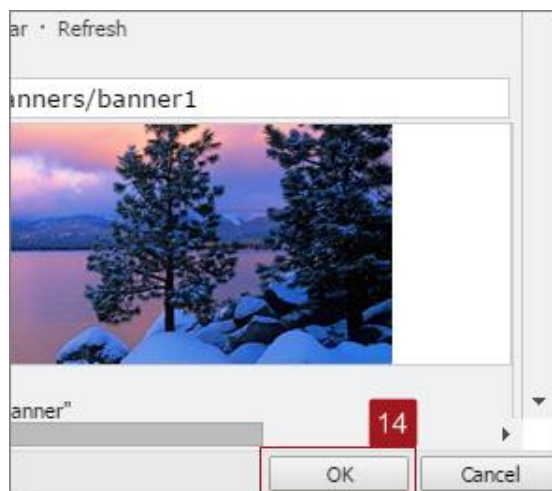
3.1.3 Navigation Styles

Several navigation styles are available in the *Desktop Navigation Style* field on the homepage data form. Navigation style refers to how the menu items are displayed. One or two levels of navigation may be enabled. The different styles include Single Level Nav, Dropdown and Mega Dropdown.

Single Level Nav: The simplest navigation style. No dropdown menu appears and only top level links display.

Dropdown: When links are hovered over their sub-links are displayed in a single column dropdown. This style has a translucent background.

Mega Dropdown: When links are hovered over their sub-links are displayed in a multi-column dropdown. This style has an opaque background and includes a description with each link.
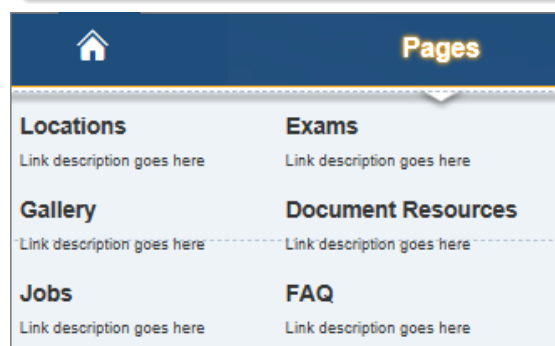
3.2 Navigation Items

Navigation items appear at the top of a site's pages in the main menu navigation section. Inside the *Content Tree,* navigation items reside inside a folder named *Navigation.*

To add a new item, right click on an item and select *Insert,* then *Navigation Item,* then fill out a name. Dropdown style menus may have up to two levels of navigation. It is possible to add more levels but they will not be visible on the website. In the next example, one top level item, *Pages*, is displayed as well as several second level items including *News* and *Events*.

The data form allows changes to properties including **Link** (the link's URL), **Description** (displayed under mega dropdown links), and **Image.** The **Link** field may be left empty for first level items to ensure they act as a menu.

3.3   Footer Link Items

Footer links are Single Level Nav items that appear at the bottom of a site's pages and provide quick links for items such as "Contact Us", "Site Map" and "Privacy Policy". The footer-links are located in the **Content Tree** in a folder named **Footer-Links.** Makes sense.

To create a new footer link item, follow these steps:

Step 1: Select the **Footer-Links** folder in the Content Tree.

Step 2: Click the **Link Item** button in the Data Form section.

Step 3: Enter the name of the new link item (This is the name that will be displayed in the footer on your website's pages).

Step 4: Click **OK** to add the new item. The new item's properties will be displayed in the data form.

**Step 5:** Click **Insert Link** above the **Link** field in the data form
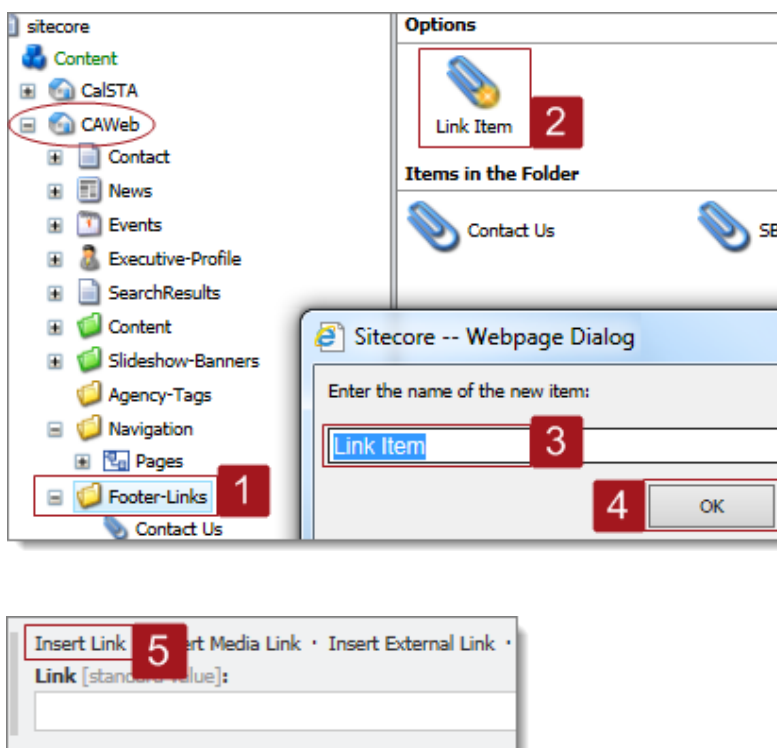
section. An "Insert Link" window will be displayed.

Step 6: Select a location to add a link to. This example links to the "CAWeb/News" page.

Step 7: Fill out the information about the link (Target refers to where the page will be in relation to).

Step 8: Click *Insert Link.* The Data Form will be in view with the *Link* field filled out.

Click the *Save* button in the *Home* tab of the *Ribbon* when finished making changes.
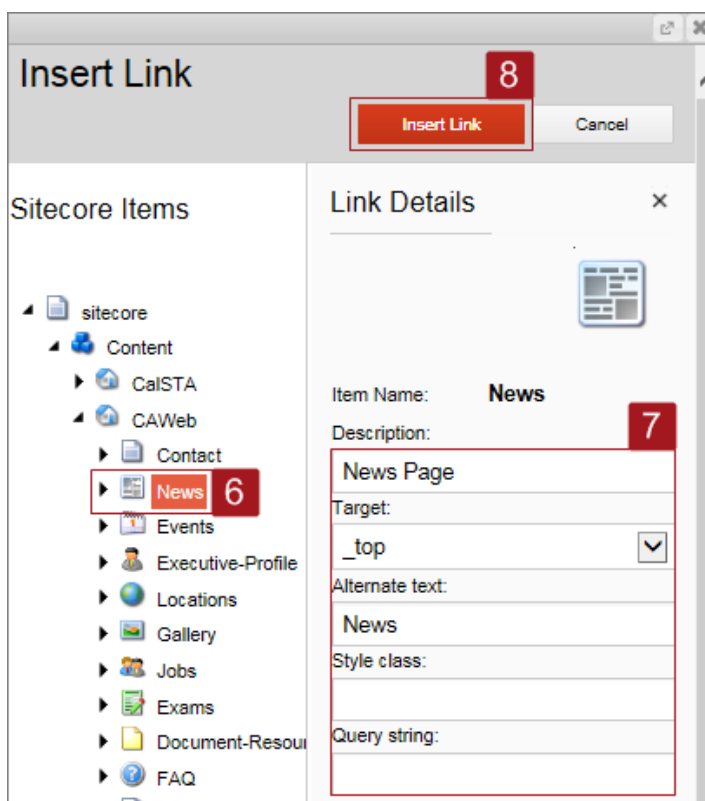
3.4 Creating Agency Tags

The CA Web Publishing Author and Editor Guide covers adding tags while adding content to a page while using the Page Editor. The tags entered via the Page Editor can be viewed, updated and deleted from the Content Editor content tree. Use caution when contemplating deleting agency tags.

Agency tags are stored in the *Agency-Tags* folder of the Content Tree. Add new tags using the methods described in Navigation Items or steps 1 through 4 of Footer Link Items.

Delete tags from the Content Tree by using the right click menu. Make sure tags are not in use on any item or list before deleting them.

4   User Management

The *User Manager* allows administrators to create new accounts, change user roles, unlock a locked account and disable accounts.

To access the User Manager, click *User Manager* in the *Home* Tab of the *Ribbon*.
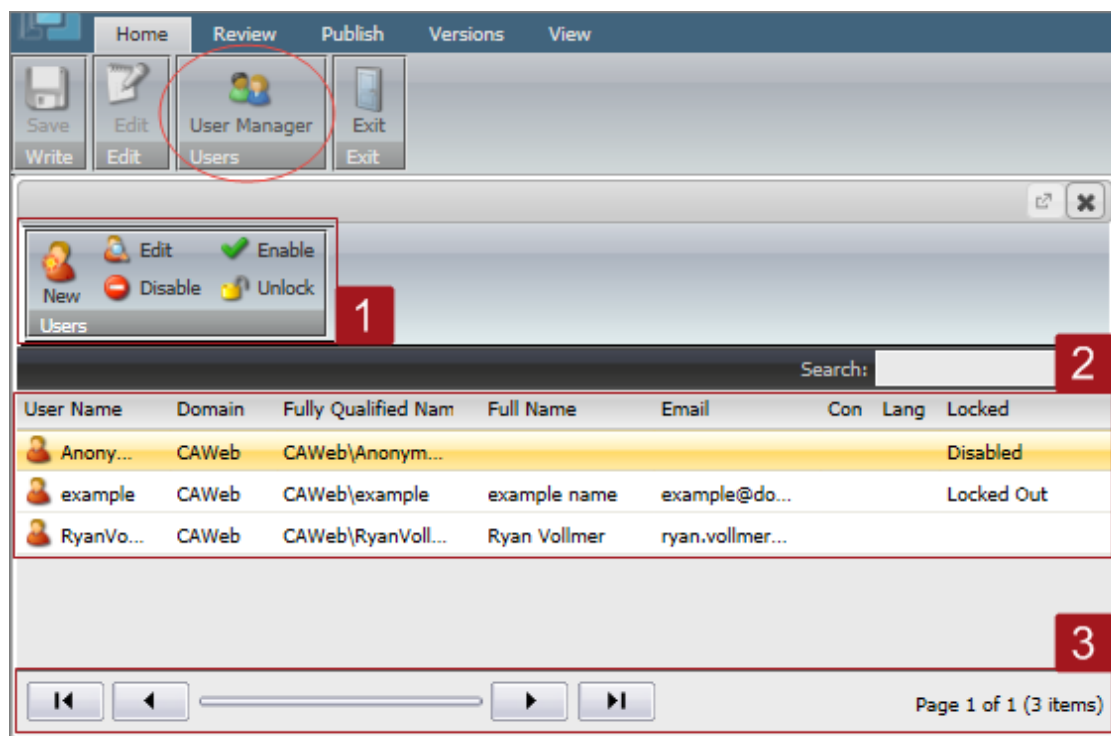
1. **Users** section **–** Create new users, Edit, Disable, and Lock user accounts.
2. **User Information –** Displays user accounts information.
3. **Navigation** – Navigate to other user accounts. There may be multiple pages of user accounts as stated in the bottom right.

4.1   Creating New Users

To add a new user click *New* in the *Users* section of the *User Manager*.

4.2   User Name Standards

When creating new user accounts it is recommended to follow these naming conventions:

Domain\FirstName + LastName + Role (no spaces)

For example, if John Doe is an Editor for the CAWeb site, his account will be:

CAWeb\JohnDoeEditor

Also note that usernames are not case-sensitive but passwords are case-sensitive.

Step 1: Enter the username in the User Name field using the syntax explained above. Don't include the domain name.

Verify the domain value is your domain. There should only be one domain available – yours!

Type the user's full name in the Full Name field.

Enter the user's email address.

Step 2: Click *Edit* to assign a role to the user.

Step 3: Select a *Role* by clicking the appropriate role in the Role list.

Step 4: Click *Add.*

The selected role should now appear in the **Selected Roles** section at the top.
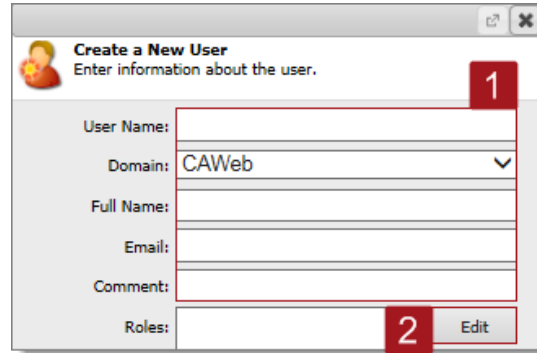
Step 5: Click *OK.*

The "Create a New User" window will now be back in focus.
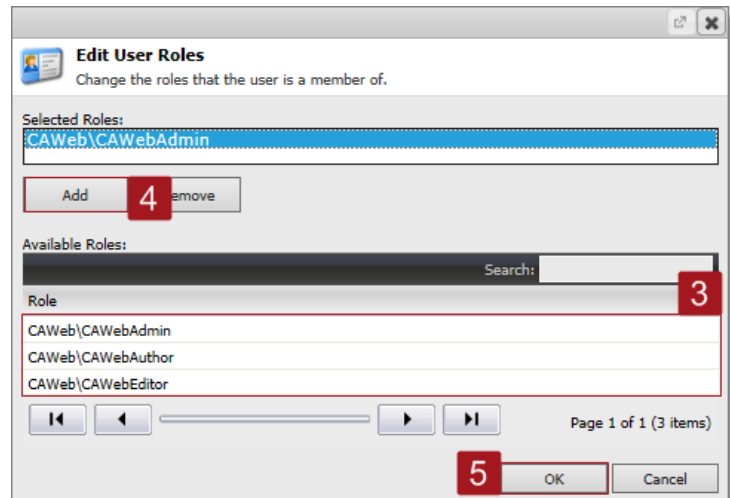
Step 6: Select a *User* from the list.

Step 7: Click *Next.*
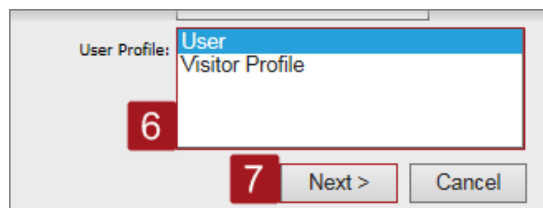
Step 8: Click *Finish* to return to the User Manager Window.

4.3   Editing Users

To edit a user account select *Edit* in the *Users* section of the *User Manager*.

Editing Users allows for changes in user accounts, including language, full name, email address and role privileges. The *Information* tab shows user activity, such as last login, date created, and last activity.

4.4   Disabling and Enabling Users

To disable or enable a user account click *Disable* or *Enable* in the *Users* section of the *User Manager*. The *Locked* column in the *User Information* section of the *User Manager* shows if an account is disabled.

4.5   Unlocking Users

If a user enters an incorrect password too many times, the account will be locked. Only users assigned the Site Admin role are able to unlock accounts. To unlock a user account, click *Unlock* in the *Users* section of the *User Manager*. The *Locked* column in the *User Information* section of the *User Manager* shows if an account is locked.